

Succession Planning Worksheet

Project/Task Inventory

Office:

Position:

Project/Task Name			
Project Description			
Milestones/Timeframes/Due Dates			
<i>Milestone/Task/Procedures/Steps</i> (Please include location information about important documents, reports, etc that relate to the specific milestones, tasks, procedures, steps)			<i>Due Date or Timeframe</i>
Important Contacts			
<i>Name and Contact Information (Phone/Email)</i>		<i>Reason or Need for Contact Related to Project or Task</i>	
Stakeholders and Contact Information (<i>Phone, Email, Address if you know it</i>)			

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Project/Task Inventory

Systems and/or Specialized Software Utilized to Complete Project
Electronic Folders and Files with Location/Path <i>(If you have only paper copies of important documents please provide a copy with this form)</i>
Helpful Hints/Tips/Job Aids (Please provide copies of any helpful documents or file locations if they are electronic as well as URLs or other locations)